

Ref #	Hits	Search Query	DBs	Default Operator	Plurals	Time Stamp
L1	7	(portfolio) and investment and ((withdrawal or distribution) same fixed same percentage same amount )	US-PGP UB; USPAT; EPO; JPO; DERWENT	OR	OFF	2005/02/17 09:04
L2	10	(portfolio) and investment and ((withdrawal or distribution) same fixed same percentage same amount )	US-PGP UB; USPAT; EPO; JPO; DERWENT	OR	ON	2005/02/17 09:05

None applicable for priority date.

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S1	106254	FINANCIAL(1W) PLANNING
S2	132	(FIXED(1W) PERCENTAGE OR FIXED(1W) DOLLAR) (5N) (WITHDRAWAL - OR PAYMENT OR DISBURSEMENT)
S3	5	<del>S1 AND S2</del>
S4	31	(FIXED(1W) PERCENTAGE OR FIXED(1W) DOLLAR) (5N) WITHDRAW?

fully reviewed  
KVIC paragraphs

Set  
S1

Items  
3

Description  
(FIXED(1W) PERCENTAGE OR FIXED(1W) DOLLAR) (5N) WITHDRAW?

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Set	Items	Description
S1	0	PORTFOLIO (S) INFLATION (S) RETURN (S) INFLATION (S) DISTRIBUTION (S) INVESTMENT(2W)OUTCOME
S2	18	PORTFOLIO (S) INFLATION (S) RETURN (S) RETIREMENT (S) DISTRIBUTION
S3	16	RD S2 (unique items)

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S2	18	PORTFOLIO (S) INFLATION (S) RETURN (S) RETIREMENT (S) DIS- TRIBUTION
S3	16	RD S2 (unique items)
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reviewed key word paragraphs.



<u>DB Name</u>	<u>Query</u>	<u>Hit Count</u>	<u>Set Name</u>
USPT,PGPB,JPAB,EPAB	retirement same withdrwal same account same (rate or periodic or annucal or monthly)	0	<u>L1</u>
USPT,PGPB,JPAB,EPAB	retirement same (withdraw??? or disburdement or distribut???) same account same (rate or periodic or annucal or monthly)	7	<u>L2</u>
USPT,PGPB,JPAB,EPAB	(estimat\$ or project\$) near5((monthly or annual) adj5 (income or withdrawal or return))	12	<u>L3</u>
USPT,PGPB,JPAB,EPAB	inflation and l3	3	<u>L4</u>
USPT,PGPB,JPAB,EPAB	l4 and monte carlo	0	<u>L5</u>
USPT,PGPB,JPAB,EPAB	monte carlo same investment	8	<u>L6</u>

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USPT,PGPB,JPAB,EPAB,DWPI	recommend??? near4 (asset adj2 allocation)	0	<u>L1</u>
USPT,PGPB,JPAB,EPAB,DWPI	asset allocation	57	<u>L2</u>

abstracts reviewed  
9/10/01

L Number	Hits	Search Text	DB	Time stamp
1	123	(portfolio) same asset same (distribution or withdrawal)	USPAT; US-PGPUB; EPO; JPO; DERWENT	2003/09/03 10:54
2	1980	(fixed) same (percentage) same amount	USPAT; US-PGPUB; EPO; JPO; DERWENT	2003/09/03 10:55
3	1869	(fixed) same (percent???) same amount	USPAT; US-PGPUB; EPO; JPO; DERWENT	2003/09/03 10:56
4	5	((portfolio) same asset same (distribution or withdrawal)) and ( (fixed) same (percentage) same amount)	USPAT; US-PGPUB; EPO; JPO; DERWENT	2003/09/03 10:56

*reviewed summary of invention for all references*